

# Consumer Industry Perspective

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**TENDRIL™**  
The Power is Yours

- **A word about Tendril**
  - Who we are
  - What we do
  - The value we bring
- **Industry Perspective**
  - Key consumer trends
  - Key energy provider & regulatory trends
  - A vision for our future

# The Energy Internet

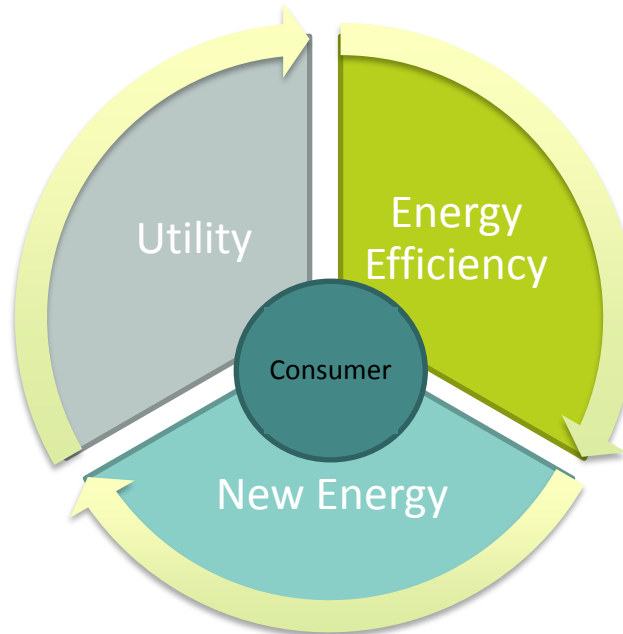
A connected, self-reinforcing, energy ecosystem

TENDRIL™  
The Power is Yours

Tendril is an Energy Platform company that has developed an open standards-based, scalable and secure technology for the Energy Internet – the network for existing grid and Smart Grid technologies.



Energy providers gain real-time information and control to manage and optimize resources.



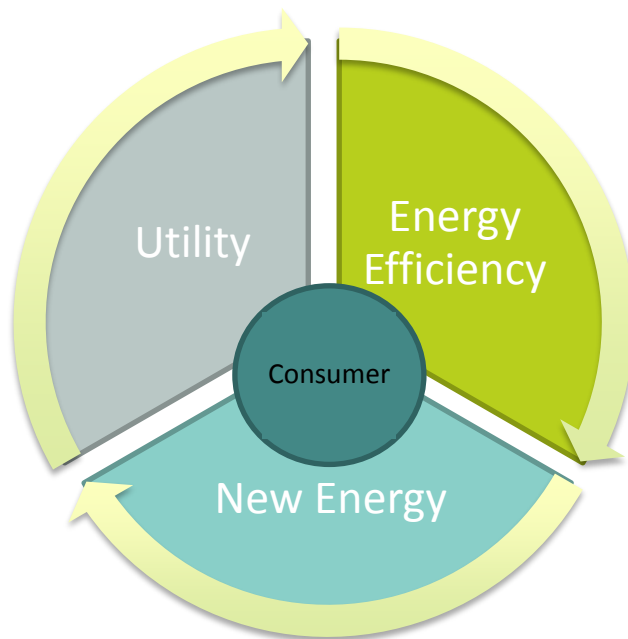
Consumers get powerful insight into their consumption and have the ability to control their spending and environmental impact.

Product and service providers can innovate within a connected energy ecosystem.



# Smart Energy

Enabling a consumer-centric ecosystem



Clean energy, Smart appliances,

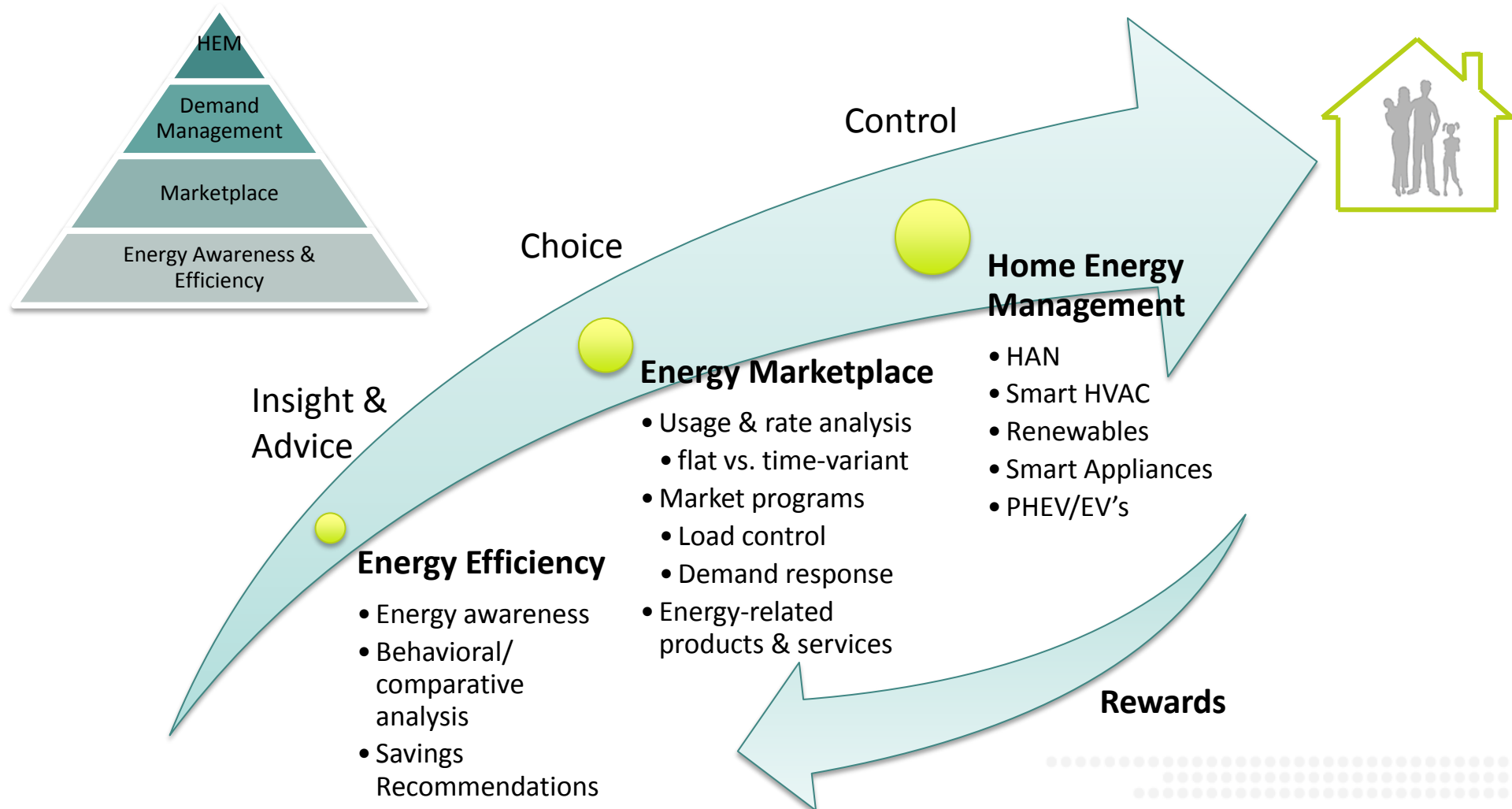
Load control, Demand response,  
Distributed energy resources

Home upgrades, Rates, Energy  
efficiency products & services

Energy awareness, insight, & advice

# Consumer Model

Engagement leads to higher levels of participation



- HQ in Boulder, CO
- Proven, Global Team
- Well funded - \$67M to date
- Complete first acquisition of GroundedPower
- Involved in more than 30 Smart Grid projects
- Industry Leading Partners
- Recognized and Award Winning Company
  - World Economic Forum 2011 Technology Pioneer
  - “Going Green” Winner
  - “Always On Global 250” Winner
  - Ranked in Global Clean Tech 100



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# Consumer Trends

Consumers expect the power of digitization, everywhere

## Modern- ization

- Cloud, Digital Enablement everywhere
- Software that thinks for us

## Environ-ment

- Awareness of social responsibility
- Significant increase in recycling

## Business models

- Software, apps should cost pennies
- I'll give up privacy for lower cost





# Energy Provider Trends

Energy providers are under siege...



## Costs

- Most commodity cost rates increasing
- Aging workforce, retraining
- Aging infrastructure that needs digitization

## Environ-ment

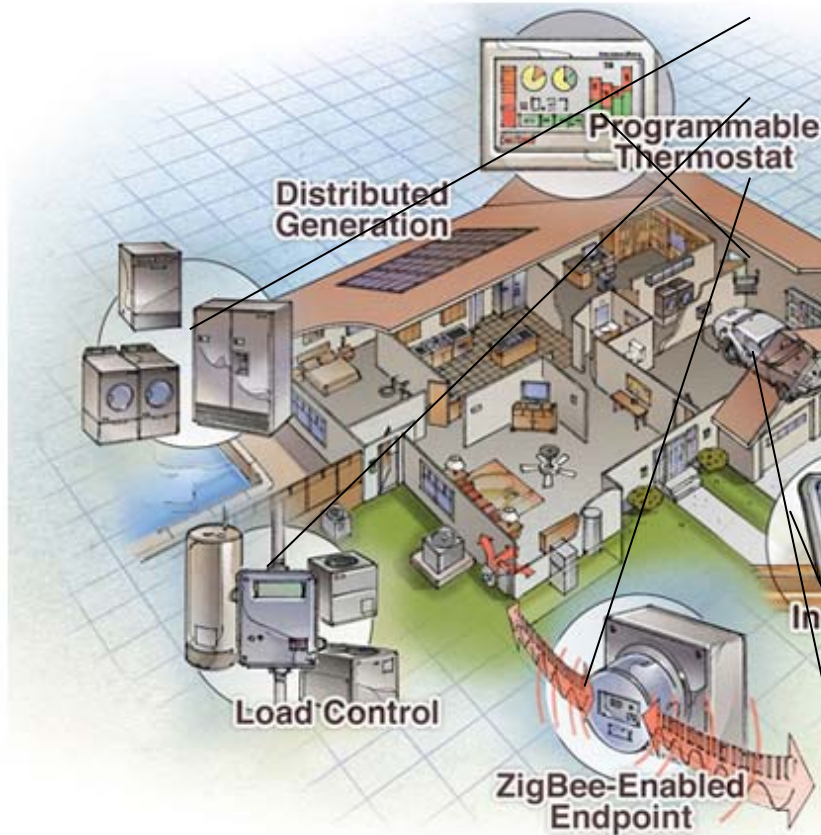
- Carbon costs, taxes, regulation
- Renewable integration, reliability

## Business models

- Best customers becoming self-sufficient
- Digital providers creating more efficiency

# A vision for the future

Bring the power of digitization to create invisible optimization



Appliances that sense; respond

ALL loads that aggregate

Gateways that are invisible

Comfort that is optimized

Information that offers wisdom

Vehicles that help; don't hurt

- Charged under optimal grid conditions
- Know what/when I want to drive, how far
- Covers me in emergencies
- Capable of providing local storage, frequency
- With no inconvenience

**Thank  
You!**